Installation Guide

CaliberRM™

Borland®

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Table of Contents

Chapter 1
Introduction 1
Borland Support 1
System Requirements 1
CaliberRM Server* 2
CaliberRM Windows and Web Client 2
Japanese Operating System Requirements 2
CaliberRM Datamart 2
CaliberRM Datamart Extractor Server 3
Database Server (MS Access or MS SQL Server) 3
CaliberRM Datamart Extractor Server and Database 3
CaliberRM Estimate Professional 3
Default Installation Settings 4
CaliberRM 4
CaliberRM Datamart and BusinessObjects 4
CaliberRM Estimate Professional 4

Chapter 2
Installing Administrative Components 5
Installing the CaliberRM Server 5
Installing the Client and Server 7
Installing the Server Only 9
Program Maintenance For CaliberRM 11
Installing CaliberRM Web and WebView 11
Program Maintenance For CaliberRM Web 13
Repairing Your Web Installation 13
Removing CaliberRM Web 14
Network Install and Upgrade 14
Modifying Your Network Install Settings 17
Modifying Your Download Options 17
Modifying Your Custom HTML Page 17
Modifying Your URL Location 18
Modifying At Each Client 18
Modifying From a Central Location Using Email 18
Installation on a Machine That Does Not Have a Web Server 18
Program Maintenance For Network Install and Upgrade 19
Modifying Your Network Install and Upgrade Installation 19
Repairing Your Network Install and Upgrade Installation 19
Removing Your Network Install and Upgrade Installation 20
Installing The StarTeam Message Broker (MPX Server) 20
Enabling MPX Post Installation 21
Reconnecting MPX if the Server Loses the Connection 21

Chapter 3
Installing User Components 23
Installing the CaliberRM Client 23
Installing the Typical or Full Client 25
Custom Installation 25
Performing an Upgrade 27
Program Maintenance for CaliberRM 28
Modifying Your Installation 28
Repairing Your Installation 28
Removing CaliberRM 29
Using the Windows Add/Remove Program to Remove CaliberRM 29
Silent Installation For Clients 29
Installing the Visual Studio .NET Integration 30
Program Maintenance For Visual Studio .NET . . . 32
Repairing Your Visual Studio .NET Integration 32
Removing Your Visual Studio .NET Integration 32

Chapter 4
CaliberRM Datamart and BusinessObjects Installation 33
Installing CaliberRM Datamart and BusinessObjects 33
Program Maintenance 36
Modifying Your Installation 36
Repairing Your Installation 37
Removing CaliberRM Datamart and BusinessObjects 37

Index 39

Chapter

1

Introduction

Welcome to CaliberRM, Borland's requirements management system. Please take a moment to review the release notes for the latest information.

Borland Support

Borland offers a variety of support options. These include free services on the Internet, where you can search our extensive information base and connect with other users of Borland products. In addition, you can choose from several categories of support, ranging from installation support to fee-based consultant-level support and extensive assistance.

For more information about Borland's support services, see our web site at **http://www.borland.com/devsupport/**.

From the Web site, you can access many newsgroups where CaliberRM users exchange information, tips and techniques.

Refer also to the Borland Community site at **http://community.borland.com**. It provides access to lots of information, articles, code examples, and upcoming news about CaliberRM.

When contacting support, be prepared to provide complete information about your environment, the version of the product you are using, and a detailed description of the problem.

For support on third-party tools or documentation, please contact the vendor of the tool.

System Requirements

Before installing CaliberRM, make sure that your computer meets the following system requirements. If you attempt to install CaliberRM on an operating system that is not supported, you will get a warning message. Please ensure your operating system is listed in the following tables.

CaliberRM Server*

Components	Minimum	Recommended
Processor	300 MHz Pentium II or higher	500 MHz Pentium III or higher
Operating System	Windows 2000 Server (SP4), Windows NT 4.0 Server (SP6-A)	
Minimum Ram Space	256 MB	1 GB
Hard Drive Space	250 MB	560 MB

* The CaliberRM Web Server only needs to meet the recommended system requirements that Apache or IIS requires.

CaliberRM Windows and Web Client

Components	Minimum	Recommended
Processor	200 MHz Pentium II or higher	500 MHz Pentium II or higher
Operating System	Windows 2000 Professional (SP4), Windows XP Professional, Windows NT 4.0 (SP6-A) workstation	
Minimum Ram Space	128 MB	256 MB
Hard Drive Space	100 MB	100 MB
Browser	IE 6	IE 6
Office Products	MS Access, MS Word & MS Excel 2000 or 2002	

Japanese Operating System Requirements

Components	Client	Server
Operating System	Windows XP or Windows 2000 PRO (SP4)	Windows 2000 Server (SP4)
Office Products	Office 2000 and 2002 (XP)	

CaliberRM Datamart

Components	CaliberRM Datamart
Operating System	Windows NT 4.0 (SP6-A) and Windows 2000
Other	CD-ROM

* MDAC 2.51 and 2.53 are NOT supported.

CaliberRM Datamart Extractor Server

If CaliberRM Datamart Extractor is installed alone and the database is installed on another machine:

Components	Minimum	Recommended
CPU	PIII 500MHz	PIII 800MHz
RAM	256MB	512MB
Hard Drive	N/A	125MB

Database Server (MS Access or MS SQL Server)

If the database is installed alone and the CaliberRM Datamart Extractor is installed on another machine:

Components	Minimum	Recommended
CPU	PII 233MHz	PIII 500MHz
RAM	256 MB	512 MB
Hard Drive	N/A	Depends on database size

CaliberRM Datamart Extractor Server and Database

If CaliberRM Datamart Extractor and the database are installed on the same machine:

Components	Minimum	Recommended
CPU	PIII 800MHz	Dual PIII 500MHz
RAM	512 MB	1 GB
Hard Drive	N/A	Depends on database size

CaliberRM Estimate Professional

Components	Recommended
CPU	200 MHz Pentium or higher
RAM	128 MB
Hard Drive	150 MB
Other Drives	CD-ROM

Note: For additional information on CaliberRM Estimate Professional. See “Integrating CaliberRM Estimate Professional” or “CaliberRM Estimate Professional User Manual” from the Windows **Start** menu, Select **Programs** > **CaliberRM** > **Documentation**.

Default Installation Settings

CaliberRM

Path, Name or Type	Location, Name or Type
CaliberRM Client Installation Path	C:\Program Files\Borland\ CaliberRM
CaliberRM Server Installation Path	C:\Borland\CaliberRMServer
Start Menu Folder	Start > Programs > CaliberRM
Samples	C:\Program Files\Borland\ CaliberRM\Samples
Documentation	C:\Program Files\Borland\ CaliberRM\Documentation
CaliberRM SDK	C:\Program Files\Borland\ CaliberRM SDK
Visual Studio .NET integration	C:\Program Files\Borland\ CaliberRM for Visual Studio.NET
User Name and Password	Both are **admin**.

CaliberRM Datamart and BusinessObjects

Path, Name or Type	Location, Name or Type
CaliberRM Datamart (server) Installation Path	C:\Program Files\Borland\CaliberRM Datamart
BusinessObjects Installation Path	C:\Program Folders\Borland\ Business Objects
Start Menu Folder Datamart	Start > Programs > Borland > CaliberRM Datamart
Start Menu Folder BusinessObjects	Start > Programs > Business Objects
Database Type	Microsoft Access
DSN Name	RMMSA
DSN Type	Microsoft Access
BusinessObjects Reports	C:\Program Files\Borland\CaliberRM Datamart\Reports\Business Objects
BusinessObjects Templates	C:\Program Files\Borland\CaliberRM Datamart\Templates\Business Objects

CaliberRM Estimate Professional

Path, Name or Type	Location, Name or Type
CaliberRM Estimate Professional Installation Path	C:\Program Files\Borland\CaliberRM\ Estimate Professional
Start Menu Folder	Start > Programs > CaliberRM > CaliberRM Estimate Professional
Database Type	Microsoft Access
Documentation	C:\Program Files\Borland\CaliberRM\ Documentation

Note: For additional information on CaliberRM Estimate Professional. See “Integrating CaliberRM Estimate Professional” or “CaliberRM Estimate Professional User Manual” from the Windows **Start** menu, Select **Programs** > **CaliberRM** > **Documentation**.

Chapter

2

Installing Administrative Components

This chapter details how to install the Administrative Components of CaliberRM, including:

- the CaliberRM server
- CaliberRM Web and WebView
- Network Install and Upgrade
- MPX server

Note: You can also install the CaliberRM Datamart and BusinessObjects, but that is not covered in this chapter. See “Chapter 4: CaliberRM Datamart Installation.”

CaliberRM Estimate Professional is installed with CaliberRM, but that is not covered in this chapter. See “Integrating CaliberRM Estimate Professional” or “CaliberRM Estimate Professional User Manual” from the Windows **Start** menu, Select **Programs** > **CaliberRM** > **Documentation**.

Installing the CaliberRM Server

There are two ways you can install the CaliberRM server: with the client (below) or alone (page 9).

Warning Terminal Services must be disabled on the CaliberRM Server machine. If not, the CaliberRM Installation Wizard prompts you to disable it and will not continue unless you disable Terminal Services.

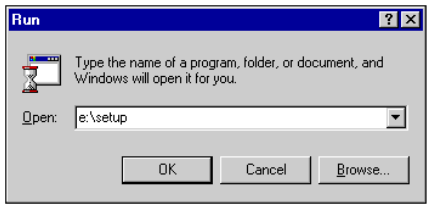
Note: The installer checks the length of the currently logged in user name and does not allow the server install to continue if the length is greater than 15 characters or contains spaces.

To install the CaliberRM server with the client:

1 Close all Windows programs before proceeding with the installation.

2 Insert the CaliberRM CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not enabled, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the **Open** field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

3 Select **Install CaliberRM Admin Components**.

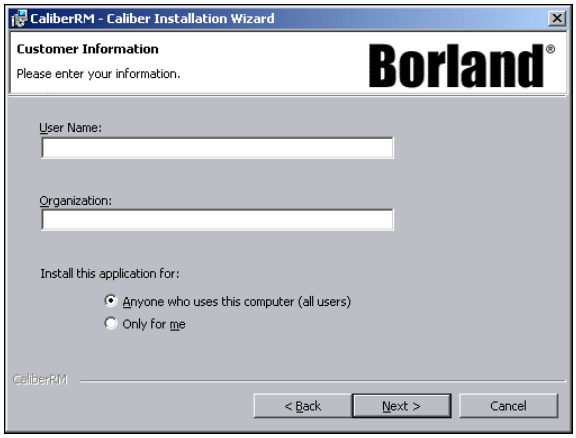
4 Select **Install CaliberRM Client & Server**. The **CaliberRM Install Wizard** starts and the **Welcome** screen is displayed.

Note: You can only upgrade to CaliberRM 2005 from CaliberRM 6.5 or 6.0. If you attempt to upgrade from an older CaliberRM version, the upgrade displays a warning message and discontinues.

5 Click **Next**. The **License Agreement** screen is displayed.

6 Read the license agreement carefully, and if you agree to the terms, select the **I accept the terms in the license agreement** option button.

7 Click **Next**. The **Customer Information** screen is displayed.

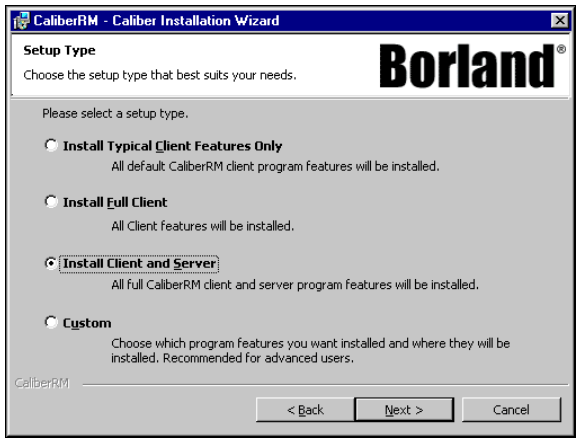


8 Enter a **User Name** and **Organization**.

9 Select an option in the **Install this application for** area.

10 Click **Next**. The **Setup Type** screen is displayed as shown on the following page.

Note: If you are performing an upgrade, setup displays the **Upgrade** screen. See page 27 for upgrade information.


CaliberRM - Caliber Installation Wizard
Setup Type
Choose the setup type that best suits your needs.
Borland
Please select a setup type.
Install Typical Client Features Only
All default CaliberRM client program features will be installed.
Install Full Client
All Client features will be installed.
Install Client and Server
All full CaliberRM client and server program features will be installed.
Custom
Choose which program features you want installed and where they will be installed. Recommended for advanced users.
CaliberRM
< Back
Next >
Cancel

11 Select the type of installation you want to perform:

- **Install Typical Client Features Only**: Installs the client only. Go to page 25.
- **Install Full Client**: Installs the client only. Go to page 25.
- I**nstall Client and Server**: Installs both the CaliberRM client and the CaliberRM server. See below.
- **Custom**: Installs only the features you select. Recommended for advanced users. Select this option if you want to install the server only. Go to page 9.

Installing the Client and Server

Warning! Terminal Services must be disabled on the CaliberRM server machine. If not, the CaliberRM Installation Wizard prompts you to disable it and will not continue unless you disable Terminal Services.

Note: The installer checks the length of the currently logged in user name and does not allow the server install to continue if the length is greater than 15 characters or contains spaces.

1 Complete steps 1-11, starting on page 5.

2 Click **Next**. The **License Keys** screen is displayed.

3 If you are installing an evaluation copy of CaliberRM, click **Next** and go to Step 5.

If you are installing a purchased copy of CaliberRM, click **Edit** next to the CaliberRM **License Key** text box.

4 Enter in your license key and click **Validate Key**.

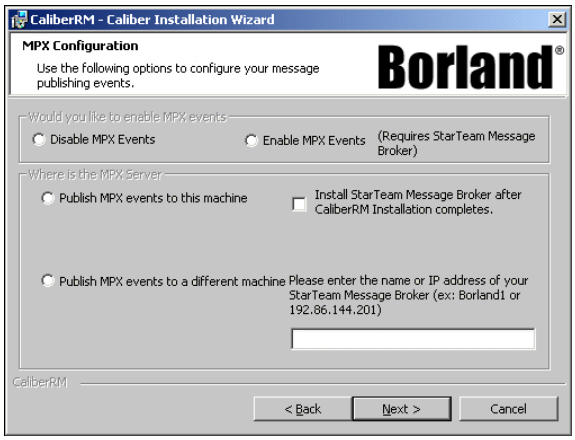
5 Click **Next**.

Note: The CaliberRM 2005 server will only accept version 7 **License Keys**, no previous versions are recognized.

Note: CaliberRM 2005 and 6.51 SP1 servers can have connectivity from the following CaliberRM clients: 2005, 6.51 SP1, 6.0, 6.5.

Note: 6.x clients will not support all of the features available in CaliberRM 2005.

The **MPX Configuration** screen is displayed.


CaliberRM - Caliber Installation Wizard
MPX Configuration
Use the following options to configure your message publishing events.
Borland
Would you like to enable MPX events
Disable MPX Events
Enable MPX Events
(Requires StarTeam Message Broker)
Where is the MPX Server
Publish MPX events to this machine
Install StarTeam Message Broker after CaliberRM Installation completes.
Publish MPX events to a different machine
Please enter the name or IP address of your StarTeam Message Broker (ex: Borland1 or 192.86.144.201)
CaliberRM
< Back
Next >
Cancel

6 To enable MPX events, select the **Enable MPX Events** option button.

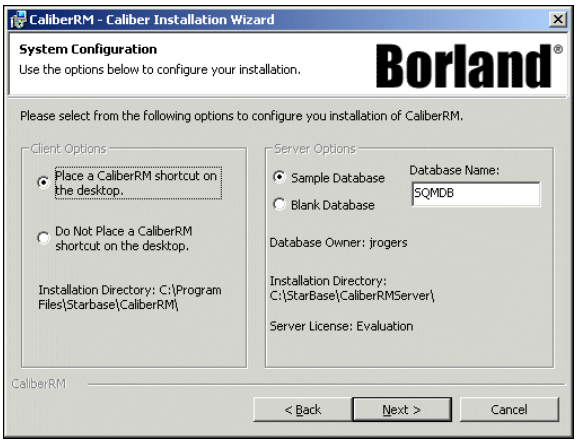
Note: Enabling MPX events is optional.

7 To designate where the MPX events are published, select an option:

- **Publish MPX events to this machine**. If you do not have MPX Broker installed, select the Install StarTeam Message Broker after CaliberRM installation completes check box. See "Installing The StarTeam Message Broker (MPX Server)" on page 20 for instructions on installing the StarTeam Message Broker.
- **Publish MPX events to a different machine**. Enter the name or IP address of the alternate machine. Choose this option if the StarTeam Message Broker is, or will be, installed on another machine.

If you do not enable MPX events, but decide to at a later time, see page 21 for instructions on enabling MPX post installation.

8 Click **Next**. The **System Configuration** screen is displayed.



9 If you do **not** want a CaliberRM shortcut on your desktop, select the **Do Not Place a CaliberRM shortcut** on the desktop option button. The default is to place a shortcut on the desktop.

10 If you do **not** want to install a sample database, select the **Blank Database** option button. The default is to install a sample database.

Note: If you are using a language option that uses double byte characters, Borland strongly recommends you do not modify the default database name from SQMDB. Testing has determined that double byte characters may cause problems if used in the database name.

11 Click **Next**. The **Ready to Install** screen is displayed.

Note: If you are attempting to install CaliberRM on a machine that has Terminal Services enabled, a warning message is displayed. You must select the check box to disable Terminal Services before you can proceed with the installation.

Note: If you are attempting to install CaliberRM on an unsupported or non-server operating system, a warning message is displayed. Before you can proceed, you must select the check box indicating you are aware that your installation is not supported. Please review the system requirements for CaliberRM on page 1.

12 Click **Install**. Setup begins installing files and displays a status bar to show progress. Click **Cancel** to cancel the installation at any time.

13 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Client Installer Information** screen.

14 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Once you reboot, the CaliberRM server attempts startup. If Terminal Services is enabled, an error message is written to the SQM Monitor log and the server will not start.

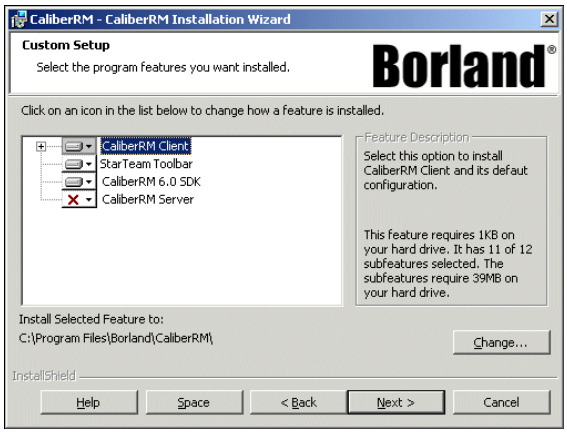
Installing the Server Only

Warning! Terminal Services must be disabled on the CaliberRM Server machine. If not, the CaliberRM Installation Wizard prompts you to disable it and will not continue unless you disable Terminal Services.

Note: The installer checks the length of the currently logged in user name and does not allow you to continue if the length is greater than 15 characters or contains spaces.

1 Complete steps 1-11, starting on page 5.

2 Click **Next**. The **Custom Setup** screen is displayed.


CaliberRM - CaliberRM Installation Wizard
Custom Setup
Select the program features you want installed.
Borland
Click on an icon in the list below to change how a feature is installed.
CaliberRM Client
StarTeam Toolbar
CaliberRM 6.0 SDK
CaliberRM Server
Feature Description
Select this option to install CaliberRM Client and its defaut configuration.
This feature requires 1KB on your hard drive. It has 11 of 12 subfeatures selected. The subfeatures require 39MB on your hard drive.
Install Selected Feature to:
C:\Program Files\Borland\CaliberRM\
Change...
InstallShield
Help
Space
< Back
Next >
Cancel

3 Click the install state icon to select the **CaliberRM Clien**t component.

4 Select the **This feature will not be available** option.

5 Click the install state icon to select the **StarTeam Toolbar** component.

6 Select the **This feature will not be available** option.

7 Click the install state icon to select the **CaliberRM SDK component**.

8 Select the **This feature will not be available** option.

9 Click the install state icon to select the **CaliberRM Server** component.

10 Select the **This feature, and all subfeatures, will be installed on local hard drive** option.

11 Click the **Help** button for information about each install state.

Click the **Space** button to see a list of the disk space requirements for each component.

Click the **Change** button if you want to change the location where the component is installed. The default install location for the server is C:\Borland\CaliberRMServer.

12 Click **Next**. The **License Keys** screen is displayed.

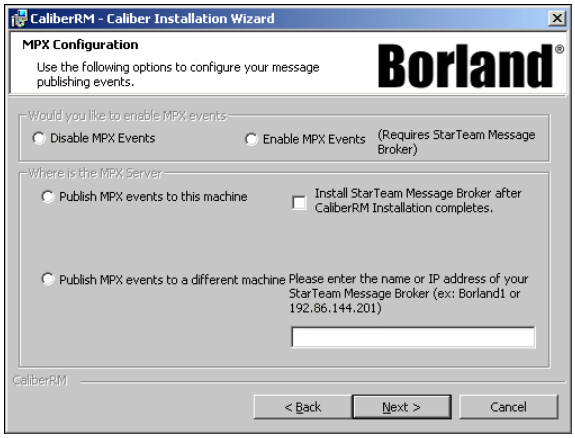
13 If you are installing an evaluation copy of CaliberRM, go to step 15.

If you are installing a purchased copy of CaliberRM, click **Edit** next to the CaliberRM **License Key** text box.

14 Enter in your license key and click **Validate Key**.

Note: The CaliberRM 2005 server will only accept version 7 **License Keys**, no previous versions are recognized.

15 Click **Next**. The **MPX Configuration** screen is displayed.


CaliberRM - Caliber Installation Wizard
MPX Configuration
Use the following options to configure your message publishing events.
Borland
Would you like to enable MPX events
Disable MPX Events
Enable MPX Events
(Requires StarTeam Message Broker)
Where is the MPX Server
Publish MPX events to this machine
Install StarTeam Message Broker after CaliberRM Installation completes.
Publish MPX events to a different machine
Please enter the name or IP address of your StarTeam Message Broker (ex: Borland1 or 192.86.144.201)
CaliberRM
< Back
Next >
Cancel

16 To enable MPX events, select the **Enable MPX Events** option button.

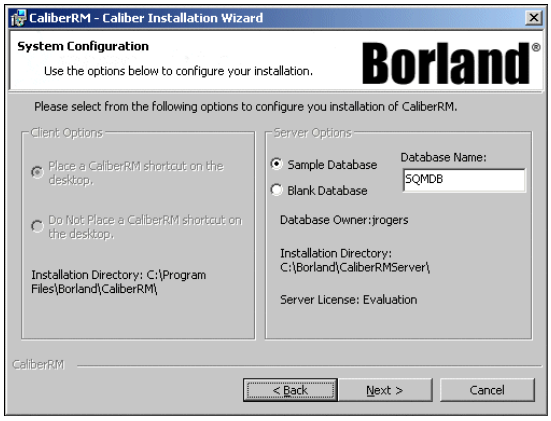
Note: Enabling MPX events is optional.

17 To designate where the MPX events are published, select an option:

- **Publish MPX events to this machine**. If you do not have MPX Broker installed, select the Install StarTeam Message Broker after CaliberRM installation completes check box. See "Installing The StarTeam Message Broker (MPX Server)" on page 20 for instructions on installing the StarTeam Message Broker.
- **Publish MPX events to a different machine**. Enter the name or IP address of the alternate machine. Choose this option if the StarTeam Message Broker is, or will be, installed on another machine.

If you do not enable MPX events, but decide to at a later time, see page 21 for instructions on enabling MPX.

18 Click **Next**. The **System Configuration** screen is displayed.



19 If you do **not** want to install a sample database, select the **Blank Database** option button. The default is to install a sample database.

20 Click **Next**. The **Ready to Install** screen is displayed.

Note: If you are attempting to install CaliberRM on a machine that has Terminal Services enabled, a warning message is displayed. You must select the check box to disable Terminal Services before you can proceed with the installation.

Note: If you are attempting to install CaliberRM on an unsupported or non-server operating system, a warning message is displayed. Before you can proceed, you must select the check box indicating you are aware that your installation is not supported. Please review the system requirements for CaliberRM on page 1.

21 Click **Install**. Setup begins installing files and displays a status bar to show progress. Click **Cancel** to cancel installation at any time.

22 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Client Installer Information** screen.

23 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Once you reboot, the CaliberRM server attempts startup. If Terminal Services is enabled, an error message is written to the SQM Monitor log and the server will not start.

Program Maintenance For CaliberRM

The CaliberRM Install Wizard allows you to perform program maintenance on your CaliberRM installation. See "Program Maintenance for CaliberRM" on page 28.

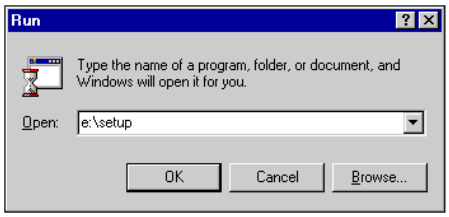
Installing CaliberRM Web and WebView

To install the CaliberRM Web View and CaliberRM Web:

1 Close all Windows programs before proceeding with the installation.

2 Insert the CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the **Open** field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

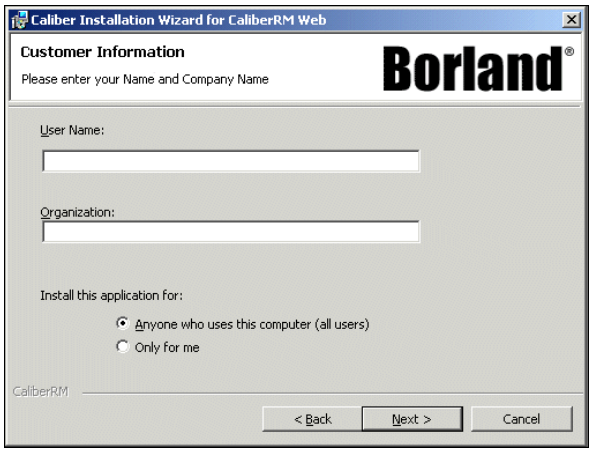
3 Click **Install Admin Components**.

4 Click **Install CaliberRM Web & WebView**. The **CaliberRM Install Wizard** starts and the **Welcome** screen is displayed.

5 Click **Next**. The **License Agreement** screen is displayed.

6 Read the license agreement carefully and if you agree to the terms, click the **I accept the terms in the license agreement** option button.

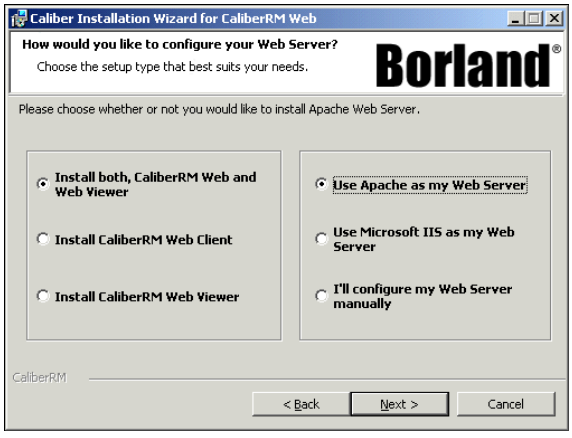
7 Click **Next**. Setup displays the **Customer Information** screen.



8 Enter your **User Name** and **Organization**

9 Select an option in the **Install this application for** area.

10 Click **Next**. Setup displays the **Web Server** screen.


Caliber Installation Wizard for CaliberRM Web
How would you like to configure your Web Server?
Choose the setup type that best suits your needs.
Borland
Please choose whether or not you would like to install Apache Web Server.
Install both, CaliberRM Web and Web Viewer
Install CaliberRM Web Client
Install CaliberRM Web Viewer
Use Apache as my Web Server
Use Microsoft IIS as my Web Server
I'll configure my Web Server manually
CaliberRM
< Back
Next >
Cancel

11 Select an installation option button:

- Install both, CaliberRM Web and CaliberRM Web Viewer
- Install CaliberRM Web Client
- Install CaliberRM Web Viewer

12 Select the web server option you would like:

- If you want to use Apache as your web server, select the **Use Apache as my Web Server** option button.
- If you want to use Microsoft IIS as your web server, select the **Use Microsoft IIS as my Web Server** option button.
- If f you want to configure your web server manually, select the **I'll configure my web server manually** option button.

13 Click **Next**. Setup displays the **Ready To Install** screen.

14 If you want to change the install location, click the **Change** button. The default path is C:\Borland\CaliberRMServer.

15 Click **Install** to begin installation. Setup displays the **Installing the CaliberRM Web** screen. Click **Cancel** to cancel the installation at any time.

When the installation is complete, setup displays the CaliberRM Installation Wizard Completed screen.

16 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Web Installer Information** screen.

17 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Program Maintenance For CaliberRM Web

The CaliberRM Install Wizard allows you to perform program maintenance on your CaliberRM Web installation.

To perform program maintenance:

1 Complete steps 1-4, starting on page 11. When CaliberRM Web is detected, Setup displays the program maintenance **Welcome** screen.

2 Click **Next**. Setup displays the **Program Maintenance** screen.

3 Select the type of program maintenance you want to perform: **Repair** or **Remove**.

See the following sections for each option.

Repairing Your Web Installation

If you have accidentally deleted or overwritten a file, you can repair your installation.

To repair your CaliberRM Web installation:

1 Select the **Repair** option button from the **Program Maintenance** screen and click **Next**. Setup displays the **Ready to Repair the Program** screen.

2 Click **Install** to complete the repair. Setup checks for missing or corrupted files and re-installs them.

3 When installation is complete, Setup displays the **CaliberRM Installation Wizard Completed** screen.

4 Click **Finish** to exit the Install Wizard. Setup displays the CaliberRM Web Installer Information screen.

5 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Removing CaliberRM Web

To remove CaliberRM Web from your system:

1 Select the **Remove** option button from the **Program Maintenance** screen and click **Next**. Setup displays the **Remove the Program** screen.

2 Click **Remove** and the uninstall procedure completes.

3 Click **Finish** to exit the Install Wizard. Setup displays the CaliberRM Web Installer Information screen.

4 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

You can also use the standard **Windows Add/Remove Programs** procedure to remove CaliberRM Web. To use this procedure, see page 29.

Network Install and Upgrade

The Network Install and Upgrade feature allows an administrator to install a one-click, self-extracting CaliberRM installation or upgrade package. The package uses a default CaliberRM .html page for users to receive available download updates. As new releases are delivered, administrators can install the new product in one place. Users are notified at login that there is a new release available and are guided through the install/upgrade process.

Note: Before installing this feature you should:

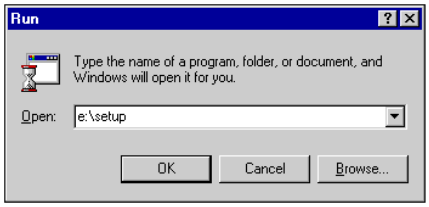
- have administrator privileges on the machine on which you are performing the install.
- have IIS or Apache running on the machine on which you are performing the install. You can have both installed on the machine, but only one running at a time. You do not need to have both installed. If you are installing on a machine that does not have IIS or Apache, refer to page 18 for more information on configuring your installation.

To install Network Install and Upgrade:

1 Close all Windows programs before proceeding with the installation.

2 Insert the CaliberRM CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not enabled, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the Open field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

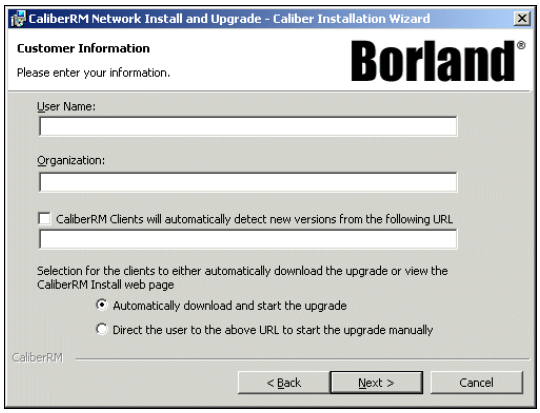
3 Select **Install CaliberRM Admin Components**.

4 Select **Install CaliberRM Network Install and Upgrade**. The CaliberRM Install Wizard starts and the **Welcome** screen is displayed.

5 Click **Next**. The **License Agreement** screen is displayed.

6 Read the license agreement carefully, and if you agree to the terms, select the **I accept the terms in the license agreement** option button.

7 Click **Next**. The **Customer Information** screen is displayed.


CaliberRM Network Install and Upgrade - Caliber Installation Wizard
Customer Information
Please enter your information.
Borland
User Name:
Organization:
CaliberRM Clients will automatically detect new versions from the following URL
Selection for the clients to either automatically download the upgrade or view the CaliberRM Install web page
Automatically download and start the upgrade
Direct the user to the above URL to start the upgrade manually
CaliberRM
< Back
Next >
Cancel

8 Enter a **User Name** and **Organization**.

9 To have CaliberRM clients check for upgrades, select the **CaliberRM Clients will automatically detect new versions from the following URL** check box. You can use the default URL, or enter a different URL in the text box.

10 Make a selection using the option buttons regarding how the upgrades will be downloaded:

- Automatically download and start the upgrade
- Direct the user to the above URL to start the upgrade manually (see below for details about the URL).

Note: To change these options later, see page 17.

When users are prompted to visit the URL, the following screen (index.htm) is displayed.

CaliberRM Network Install & Upgrade - Microsoft Internet Explorer
Borland
Look at what's new on Borland.com
Check the CaliberRM White Papers and Release Notes
Check the Borland Support Website
How Can I get Borland Professionals on-site?
How can I get additional Training?
How can I contact customer service?
Tell me more about Borland Professional Services
Install or Upgrade to CaliberRM 6.0
Borland

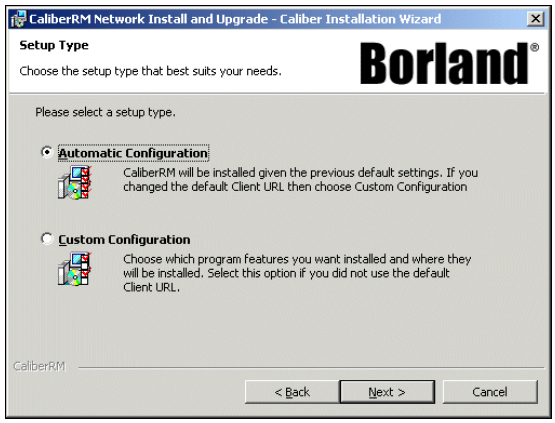
This pane can be modified.

Do not modify this pane.

The page consists of two panes. The upper pane contains the file RMINSTALL2.htm, and can be modified with any text editor. You can include links, images and any other information. This enables you to customize the page according to your organization's needs.

The lower pane contains the file RmInstallxx.htm (**xx** representing the release number), which should not be modified. However, if after the installation, you need to change the URL for the **Install or Upgrade to CaliberRM v.x** link, you can edit it. See "Modifying Your URL Location" on page 18 for more information.

11 Click **Next**. The **Setup Type** screen is displayed.


CaliberRM Network Install and Upgrade - Caliber Installation Wizard
Setup Type
Choose the setup type that best suits your needs.
Borland
Please select a setup type.
Automatic Configuration
CaliberRM will be installed given the previous default settings. If you changed the default Client URL then choose Custom Configuration
Custom Configuration
Choose which program features you want installed and where they will be installed. Select this option if you did not use the default Client URL.
CaliberRM
< Back
Next >
Cancel

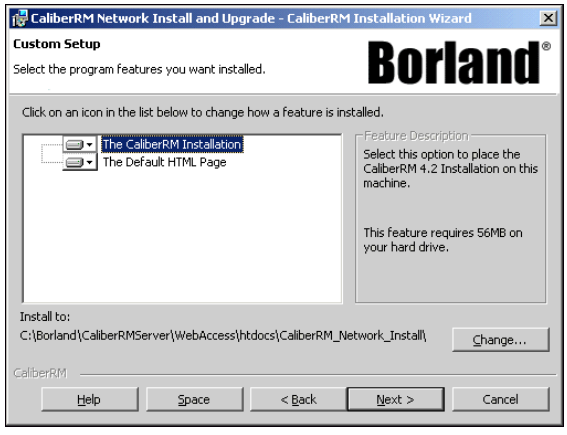
12 Select the type of installation you want:

- **Automatic Configuration**: Installs the product using the client URL settings you chose in step 9. Select this option if you are installing this feature on a machine that has an IIS or Apache web server.
- **Custom Configuration**: Allows you to change the Client URL for installing updates. Select this option if your web server is something other than Apache or IIS, or if you want to install this feature on a machine that is not running a web server.

Note: If you select Custom, you may have to open your web service and create a virtual directory. See page 18 for more information.

13 Click **Next**. For **Automatic Configuration**, go to step 17.

The Custom Setup screen is displayed.


CaliberRM Network Install and Upgrade - CaliberRM Installation Wizard
Custom Setup
Select the program features you want installed.
Borland
Click on an icon in the list below to change how a feature is installed.
The CaliberRM Installation
The Default HTML Page
Feature Description
Select this option to place the CaliberRM 4.2 Installation on this machine.
This feature requires 56MB on your hard drive.
Install to:
C:\Borland\CaliberRMServer\WebAccess\htdocs\CaliberRM_Network_Install\
Change...
CaliberRM
Help
Space
< Back
Next >
Cancel

14 Select a component to install by clicking on the install state icon.

- **The CaliberRM Installation**: installs the Network Install and Upgrade feature.

- **The Default HTML page**: installs the index.htm, the RMINSTALL2.htm, and RmInstallxx.htm (**xx** representing the release number) files.

15 Choose the installation option for each component.

16 Click the **Help** button for information about each install state.

Click the **Space** button to see a list of the disk space requirements for each component.

Click the **Change** button if you want to change the location where the component is installed. The default path is: C:\Borland\CaliberRMServer\WebAccess\CaliberRM_Network_Install.

17 The **Ready to Install** screen is displayed. Click **Install** to begin the installation. Setup begins installing files and displays a status bar to show progress. Click **Cancel** to cancel the installation at any time.

18 Click **Finish**.

Modifying Your Network Install Settings

You can modify the download options, a section of the index.htm page, and the URL from which CaliberRM users download the product and available upgrades.

Modifying Your Download Options

You can modify the download option you selected for your clients during installation.

To modify your option:

1 Navigate to the **version.ini** file.

The file resides in the default installation folder for the Network Install and Upgrade: C:\Borland\CaliberRMServer\WebAccess\HTDocs\CaliberRM_Network_Install.

2 Right-click the file, select **Open with** and select **Notepad** from the list.

3 Locate the line:

autodownload =n

4 If you want CaliberRM clients to automatically download and start the upgrade, replace **n** with a **1**.

If you want CaliberRM clients to direct the user to the specified URL to start the upgrade, replace **n** with a **0**.

5 Select **File > Save** from the menu, then close the file.

Modifying Your Custom HTML Page

To modify your HTML page:

1 Navigate the RMINSTALL2.htm file.

The file resides in the default installation folder for the Network Install and Upgrade: C:\Borland\CaliberRMServer\WebAccess\HTDocs\CaliberRM_Network_Install\RMINSTALL2.htm.

2 Right-click the file, select **Open with** and select **Notepad** from the list.

3 Modify as necessary/desired.

Modifying Your URL Location

You can modify the download URL location two ways:

- at each client, or
- from a central location using a simple email process.

Before modifying your URL location using either method, you must perform the following steps:

1. Open the file RmInstallxx.htm ("xx" representing the release number) with Notepad.
2. Find the statement:

   URL = http://server name/CaliberRM_Network_Install
3. Modify the statement with the new or renamed virtual path.

Modifying At Each Client

To modify the URL download location by client:

1. In CaliberRM, select **Tools > Options** from the menu.
2. On the **General** tab, in the **URL** text box, enter the new URL.
3. Click **OK**.

Modifying From a Central Location Using Email

To modify the URL download location using email:

1. Using your web browser, open the new CaliberRM Default Webpage using the new path.
2. Copy and email the new link to each user.

When the user clicks the link, the CaliberRM Default Webpage opens, and the URL directory is automatically reconfigured within CaliberRM.

Installation on a Machine That Does Not Have a Web Server

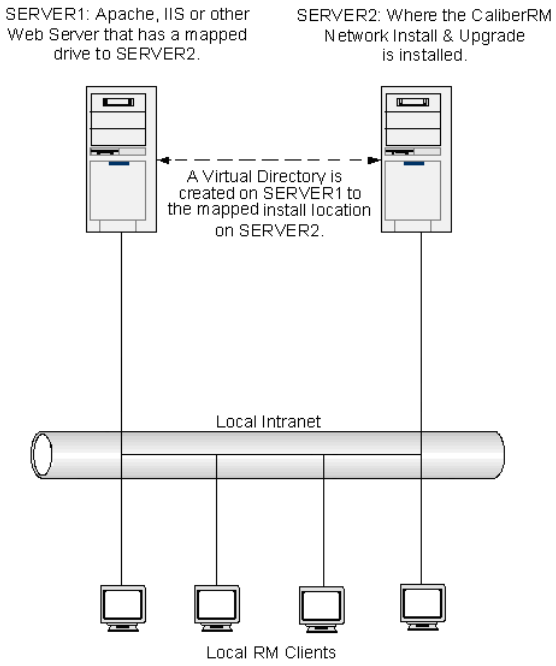
Email the URL to the CaliberRM Network Install & Upgrade's URL to the client machines.

Example URL to email: http://Server1/Admin/CaliberRM_Network_Install

Each machine is able to download and begin the CaliberRM installation or upgrade.

Once the product is installed, the client machines automatically check for a new version of CaliberRM available. If there is a newer version available, the CaliberRM client downloads the upgrade.

See the figure below for clarification.


SERVER1: Apache, IIS or other Web Server that has a mapped drive to SERVER2.
SERVER2: Where the CaliberRM Network Install & Upgrade is installed.
A Virtual Directory is created on SERVER1 to the mapped install location on SERVER2.
Local Intranet
Local RM Clients

Program Maintenance For Network Install and Upgrade

The CaliberRM Install Wizard allows you to perform program maintenance on your Network Install and Upgrade installation.

To perform program maintenance:

1. Complete steps 1-4, starting on page 14. When **Network Install and Upgrade** is detected, Setup displays the program maintenance **Welcome** screen.
2. Click **Next**. Setup displays the **Program Maintenance** screen.
3. Select the type of program maintenance you want to perform: **Modify**, **Repair** or **Remove**.

See the following sections for each option.

Modifying Your Network Install and Upgrade Installation

If you want to add or remove a feature from your installation, you can modify your installation.

To modify your installation:

1. Click the **Modify** option from the **Program Maintenance** screen and click **Next**. Setup displays the **Custom Setup** screen.
2. Complete steps 14-20, starting on page 16.

Repairing Your Network Install and Upgrade Installation

If you have accidentally deleted or overwritten a file, you can repair your installation.

To repair your Network Install and Upgrade installation:

1. Select the **Repair** option button from the **Program Maintenance** screen and click **Next**. Setup displays the **Ready to Repair the Program** screen.
2. Click **Install** to complete the repair. Setup checks for missing or corrupted files and re-installs them.
3. When installation is complete, Setup displays the **CaliberRM Installation Wizard Completed** screen.
4. Click **Finish** to exit the Install Wizard. Setup displays the CaliberRM Network Install and Upgrade Installer Information screen.
5. Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Removing Your Network Install and Upgrade Installation

To remove Network Install and Upgrade from your system:

1. Select the **Remove** option button from the **Program Maintenance** screen.
2. Click **Next**. Setup displays the **Remove the Program** screen.
3. Click **Remove** and the uninstall procedure completes.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

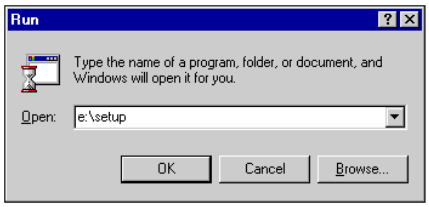
You can also use the standard **Windows Add/Remove Programs** procedure to remove Network Install and Upgrade. To use this procedure, go to page 29.

Installing The StarTeam Message Broker (MPX Server)

To install the MPX server:

1. Close all Windows programs before proceeding with the installation.
2. Insert the CaliberRM CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not enabled, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the **Open** field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

3. Select **Install CaliberRM Admin Components**.
4. Select **Install MPX Server**. The StarTeam Message Broker Install Wizard starts and the **Welcome** screen is displayed.
5. Click **Next**. The **License Agreement** screen is displayed.
6. Read the license agreement carefully, and if you agree to the terms, click **Yes**. The **Message Broker Service Type** screen is displayed.

7 Select the type of service you want: **Automatic** or **Manual**.

8 Click **Next**. The **Destination Location** screen is displayed.

9 Click **Browse** to change the location for install or click **Next**. The **Folder Selection** screen is displayed for determining where product icons will be located.

10 Click **Next**. The **Setup Complete** screen is displayed.

11 Click **Finish** to exit the wizard.

Enabling MPX Post Installation

You can enable MPX events after performing an install.

Note: These steps should only be performed by an administrator.

To enable MPX events:

1 On the machine where the CaliberRM server is installed, select **Start > Run**.

2 In the **Open** area, enter **regedit** and click **OK**.

3 Under HKEY_LOCAL_MACHINE, navigate to Software\Borland\CaliberRM\6.5\Server\MPX.

4 Double-click **Broker**. In the **Value data** area, enter the name or IP address of the machine where MPX is installed and click **OK**.

5 Double-click **Server**. In the **Value data** area, enter the name or IP address of the machine where MPX is installed and click **OK**.

6 Double-click **Enable**. In the **Value data** area, enter a **1** to turn on MPX events and click **OK**.

7 Close the Registry Editor.

Note: You must stop and restart the server before MPX is active.

Reconnecting MPX if the Server Loses the Connection

If the connection is lost on the CaliberRM server side, and you receive an error message from the CaliberRM server, you must restart the CaliberRM server.

If the connection is lost on the MPX side, you must restart the MPX server, then the CaliberRM server.

Chapter

3

Installing User Components

This chapter details how to install the User Components of CaliberRM, including:

- the CaliberRM client
- User Integrations

CaliberRM Estimate Professional is installed with CaliberRM, but that is not covered in this chapter. See “Integrating CaliberRM Estimate Professional” or “CaliberRM Estimate Professional User Manual” from the Windows **Start** menu, Select **Programs** > **CaliberRM** > **Documentation**.

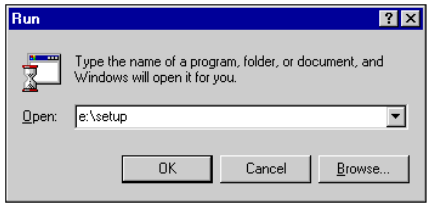
Installing the CaliberRM Client

To install CaliberRM:

1 Close all Windows programs before proceeding with the installation.

2 Insert the CaliberRM CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not enabled, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the **Open** field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

3 Click **Install User Components**.

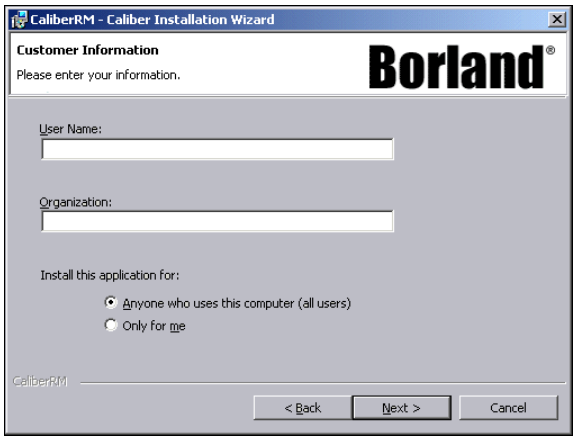
4 Click **Install CaliberRM Client**. The CaliberRM Install Wizard starts and the **Welcome** screen is displayed.

Note: You can only upgrade to CaliberRM 2005 from CaliberRM 6.5 or 6.0. If you attempt to upgrade from an older CaliberRM version, the upgrade displays a warning message and discontinues.

5 Click **Next**. The **License Agreement** screen is displayed.

6 [1]Read the license agreement carefully, and if you agree to the terms, select the I **accept the terms in the license agreement** option button.

7 Click **Next**. The **Customer Information** screen is displayed.

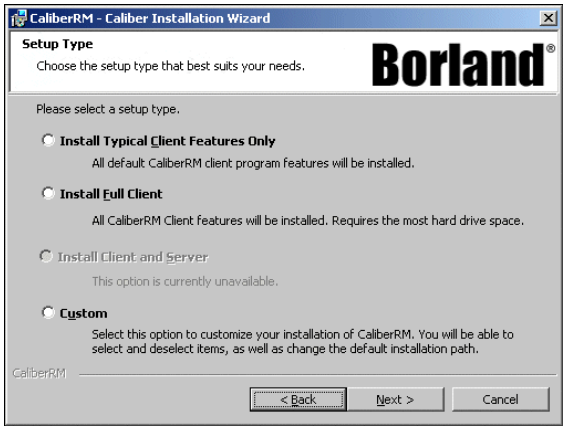


8 Enter a **User Name** and **Organization**.

9 Click an option in the **Install this application for** area.

10 Click **Next**. The **Setup Type screen** is displayed.

Note: If you are performing an upgrade, setup displays the **Upgrade** screen. See “Performing an Upgrade” on page 27.


CaliberRM - Caliber Installation Wizard
Setup Type
Choose the setup type that best suits your needs.
Borland
Please select a setup type.
Install Typical Client Features Only
All default CaliberRM client program features will be installed.
Install Full Client
All CaliberRM Client features will be installed. Requires the most hard drive space.
Install Client and Server
This option is currently unavailable.
Custom
Select this option to customize your installation of CaliberRM. You will be able to select and deselect items, as well as change the default installation path.
CaliberRM
< Back
Next >
Cancel

11 Select the type of installation you want to perform:

- **Install Typical Client Features Only**: This option installs: CaliberRM, StarTeam Toolbar, Help Files, Diagnostic Tool, Document Factory, Reports, CaliberRM Viewer, the CaliberRM SDK and Sample Documents. See below.
- **Install Full Client**: Installs all CaliberRM client programs listed above, plus Framework Administrator and RM Export and RM Import. See below.

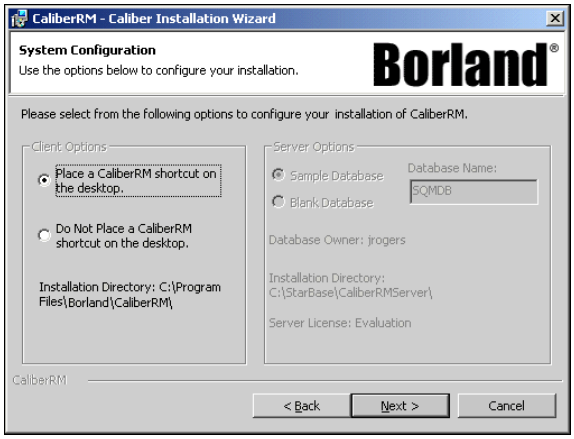
1.

- **Custom**: Installs only the features you select. Recommended for advanced users. Go to page 25.

Installing the Typical or Full Client

1 Complete steps 1-11, starting on page 23.

2 Click **Next**. The **System Configuration** screen is displayed.



3 If you do **not** want a CaliberRM shortcut on your desktop, select the **Do Not Place a CaliberRM shortcut on the desktop** option button. The default is to place a shortcut on the desktop.

4 Click **Next**. The **Ready to Install** screen is displayed.

Note: If you are attempting to install CaliberRM on an unsupported operating system, a warning message is displayed. Before you can proceed, you must select the check box indicating you are aware that your installation is not supported. Please review the system requirements for CaliberRM on page 1.

5 Click **Install**. Setup begins installing files and displays a status bar to show progress. Click **Cancel** to cancel installation at any time.

6 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Client Installer Information** screen.

7 Click **Yes** to restart your system immediately, or **No** to restart later.

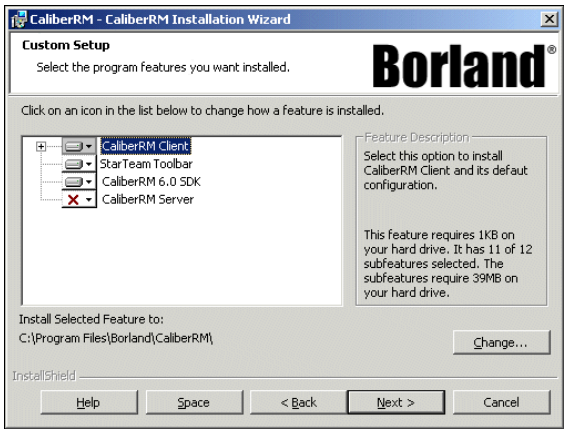
Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Custom Installation

Note: The default custom install is the same as a typical install (does not have the server enabled).

1 Complete steps 1-11, starting on page 23.

2 Click **Next**. The **Custom Setup** screen is displayed.


CaliberRM - CaliberRM Installation Wizard
Custom Setup
Select the program features you want installed.
Borland
Click on an icon in the list below to change how a feature is installed.
CaliberRM Client
StarTeam Toolbar
CaliberRM 6.0 SDK
CaliberRM Server
Feature Description
Select this option to install CaliberRM Client and its defaut configuration.
This feature requires 1KB on your hard drive. It has 11 of 12 subfeatures selected. The subfeatures require 39MB on your hard drive.
Install Selected Feature to:
C:\Program Files\Borland\CaliberRM\
Change...
InstallShield
Help
Space
< Back
Next >
Cancel

3 Click on the install state icon for a component.

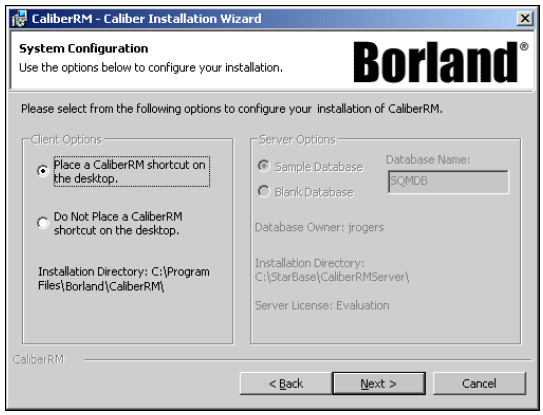
4 Choose the installation option for each component.

5 Click the **Help** button for information about each install state.

Click the **Space** button to see a list of the disk space requirements for each component.

Click the **Change** button if you want to change the location where the component is installed. The default install location for the client is C:\Program Files\Borland\CaliberRM.

6 Click **Next**. The **System Configuration** screen is displayed.



7 If you do **not** want a CaliberRM shortcut on your desktop, select the **Do Not Place a CaliberRM shortcut on the desktop** option button. The default is to place a shortcut on the desktop.

8 Click **Next**. The **Ready to Install** screen is displayed.

9 Click **Install**. Setup begins installing files and displays a status bar to show progress. Click **Cancel** at any time to cancel the installation.

Note: If you are attempting to install CaliberRM on an unsupported operating system, a warning message is displayed. Before you can proceed, you must select the check box indicating you are aware that your installation is not supported. Please review the system requirements for CaliberRM on page 1.

10 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Client Installer Information** screen.

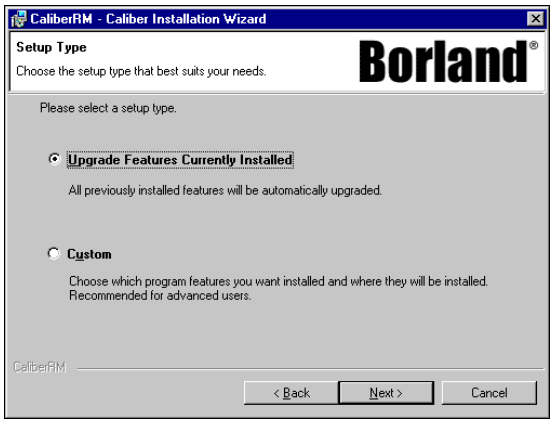
11 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Performing an Upgrade

Note: You can only upgrade to CaliberRM 2005 from CaliberRM 6.5 or 6.0. If you attempt to upgrade from an older CaliberRM version, the upgrade displays a warning message and discontinues.

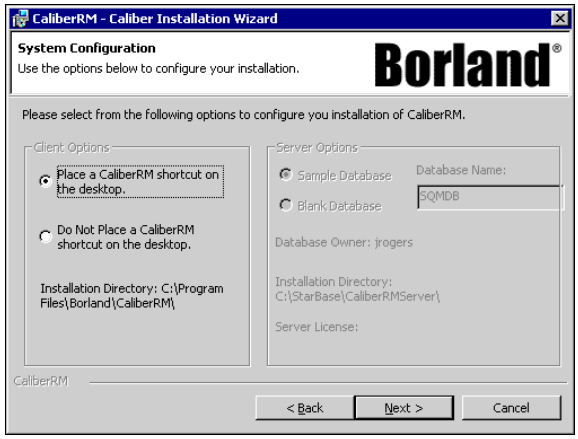
1 Complete steps 1-10, starting on page 23. Setup displays the **Setup Type** screen.


CaliberRM - Caliber Installation Wizard
Setup Type
Choose the setup type that best suits your needs.
Borland
Please select a setup type.
Upgrade Features Currently Installed
All previously installed features will be automatically upgraded.
Custom
Choose which program features you want installed and where they will be installed.
Recommended for advanced users.
CaliberRM
< Back
Next >
Cancel

2 Select the type of upgrade you want to perform:

- **Upgrade features currently installed**: Upgrades all of the features that are currently installed.
- **Custom**: Installs only the features you select. Recommended for advanced users. See page 25 for instructions on performing a custom installation.

3 Click **Next**. The **System Configuration** screen is displayed.



4 If you do **not** want a CaliberRM shortcut on your desktop, select the **Do Not Place a CaliberRM shortcut on the desktop** option button. The default is to place a shortcut on the desktop.

5 Click **Next**. The **Ready to Install** screen is displayed.

Note: If you are attempting to install CaliberRM on an unsupported operating system, a warning message is displayed. Before you can proceed, you must select the check box

indicating you are aware that your installation is not supported. Please review the system requirements for CaliberRM on page 1.

6 Click **Install**. Setup begins installing files and displays a status bar to show progress. Click **Cancel** to cancel installation at any time.

7 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Client Installer Information** screen.

8 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Program Maintenance for CaliberRM

The CaliberRM Installation Wizard allows you to modify, repair or remove your CaliberRM installation.

To perform program maintenance:

1 Complete steps 1-4 starting on page 23. Setup displays the **Program Maintenance** screen.

2 Select the type of program maintenance you want to perform: **Modify**, **Repair** or **Remove**.

See the following sections for each option.

Modifying Your Installation

If you want to add or remove a feature from your installation, you can modify your installation.

To modify your installation:

1 Click the **Modify** option from the **Program Maintenance** screen and click **Next**. Setup displays the **Custom Setup** screen.

2 Complete steps 3-11, starting on page 26.

Note: You do not have access to the Server Options while modifying your installation.

Repairing Your Installation

If you have accidentally deleted or overwritten a file, you can repair your installation.

To repair the CaliberRM installation:

1 Click the **Repair** option from the **Program Maintenance** screen.

2 Click **Next**. Setup displays the **Program Repair** screen.

3 Click **Install** to complete the repair. Setup installs the required files. Click **Cancel** to cancel installation at any time.

4 Click **Finish** to exit the Install Wizard. Setup displays the **CaliberRM Client Installer Information** screen.

5 Click **Yes** to restart your system immediately, or **No** to restart later.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Removing CaliberRM

To remove the CaliberRM from your system:

1 Click **Remove** from the **Program Maintenance** screen.

2 Click **Next**. Setup displays the **Remove the Program** screen.

3 Click **Remove**.The uninstall procedure completes.

Using the Windows Add/Remove Program to Remove CaliberRM

You can also use the standard Windows Add/Remove Programs procedure to remove CaliberRM.

To uninstall CaliberRM using the Windows Add/Remove Programs procedure:

1 Click the Windows **Start** button and click **Settings > Control Panel**.

2 When the control panel appears, double-click the **Add/Remove Programs** icon.

3 Select the program you want to remove from the program list.

4 Click **Add/Remove**. The **InstallShield** window opens.

5 Click **Next**, then **Remove**. InstallShield removes CaliberRM from your system.

6 When the InstallShield program is complete, click **Finish**.

7 If prompted, you must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Silent Installation For Clients

You can install or upgrade a CaliberRM client using a silent installation process that uses command line options to run the installation.

Note: The silent install feature cannot be used to install the CaliberRM server.

To use the silent installation option, you must be at a command prompt in the folder where CaliberRM.msi resides, or enter the full path to that folder.

A typical silent installation command with full path to the folder on a local CD-ROM drive would be:

Setup.exe /S /V“/qn+”

The minimum required command to accomplish a command line install is **Setup.exe /V“/qn”**. However, this command is not completely silent; you will see a brief splash screen advising that CaliberRM setup is preparing the InstallShield Wizard. The **/S** eliminates this splash screen.

A **+** following **/qn** causes a confirmation dialog box to appear upon completion. This dialog box confirms completion or advises of failure in the event the install failed.

Command	Description
Setup.exe /S /V“/qn+”	Installs or upgrades the CaliberRM client silently. A confirmation dialog box appears upon completion if you include the plus (+) sign. The /S, /V, and /qn modifiers are case sensitive.
Setup.exe /S /V“/qn+ ALLCLIENT=YES”	Enables all features when installing CaliberRM. Note that the ALLCLIENT option is case sensitive.

Command	Description
Setup.exe /S /V“/qn+ FEATURE=YES”	Disables any feature and prevents the user from enabling that option in Custom installation mode. Note that the NOHELP option is case sensitive. You can install the Help files using a Custom Modification at a later time. See the table below for the feature commands for this option.

Accepted command line options are:

- NOCLIENT
- NODOCFACTORY
- NOTUTORIAL
- NOVIEWS
- NOEXPORT
- NOFRAMEWORK
- NODIAGTOOL
- NOVIEWER
- ALLCLIENT
- NOHELP
- NOUSERGUIDES
- NOREPORTS
- NOSBTOOLBAR
- NOSAMPLES
- NOSDK
- NORELEASENOTES

The **No** options are the equivalent of deselecting options in a custom install.

Multiple command line options are acceptable. For example, to install CaliberRM without the Framework Administrator and without a confirmation dialog box appearing upon completion:

Setup.exe /S /V“/qn NOFRAMEWORK=YES ALLCLIENT=YES”

Or, to install CaliberRM without the Framework Administrator but with a confirmation dialog box appearing upon completion:

Setup.exe /S /V“/qn+ NOFRAMEWORK=YES ALLCLIENT=YES”

In the event of an upgrade, the modifiers take precedence over the default option to upgrade existing components.

Installing the Visual Studio .NET Integration

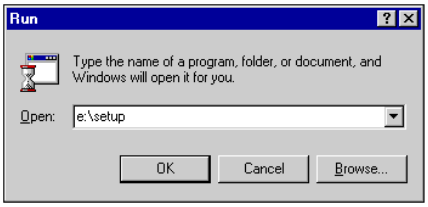
Note: The Visual Studio .NET integration requires that the CaliberRM SDK be installed. The integration installation wizard automatically installs the CaliberRM SDK if it is not already installed.

To install the integration:

1 Close all Windows programs before proceeding with the installation.

2 Insert the CaliberRM CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not enabled, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the **Open** field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

3 Click **Install User Components**.

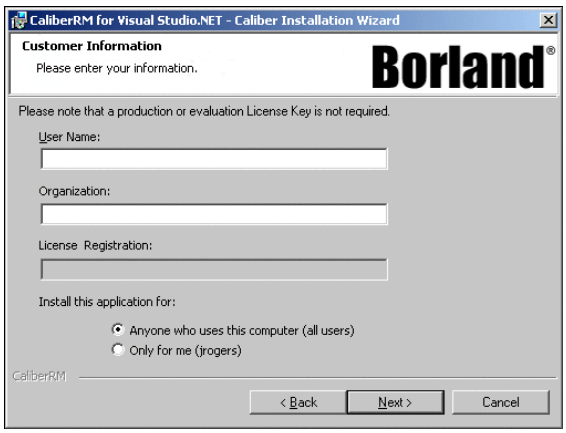
4 Click **Install User Integrations**.

5 Click **Install Visual Studio .NET integration for CaliberRM**. The CaliberRM Install Wizard starts and the **Welcome** screen is displayed.

6 Click **Next**. The **License Agreement** screen is displayed.

7 Read the license agreement carefully, and if you agree to the terms, select the **I accept the terms in the license agreement** option button.

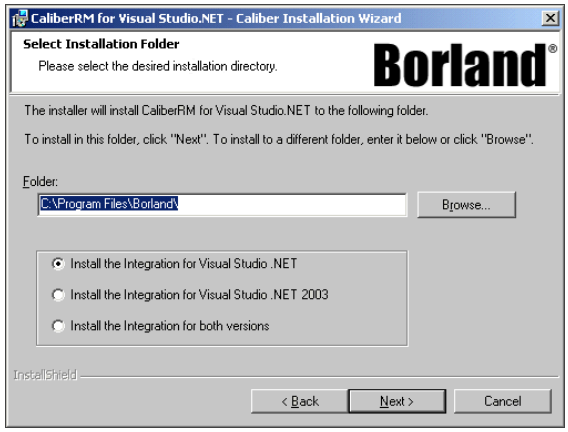
8 Click **Next**. The **Customer Information** screen is displayed.



9 Enter a **User Name** and **Organization**.

10 Click an option in the **Install this application for** area.

11 Click **Next**. The **Select Installation Folder** screen is displayed.


CaliberRM for Visual Studio.NET - Caliber Installation Wizard
Select Installation Folder
Please select the desired installation directory.
Borland
The installer will install CaliberRM for Visual Studio.NET to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files\Borland\
Browse...
Install the Integration for Visual Studio .NET
Install the Integration for Visual Studio .NET 2003
Install the Integration for both versions
InstallShield
< Back
Next >
Cancel

12 To change the folder location, click **Browse**.

13 Select the version you want to install:

- Install Visual Studio .NET
- Install Visual Studio .NET 2003
- Install Visual Studio .NET for both versions

14 Click **Next**.

15 Click **Install**. The installation begins.

16 When installation is complete, click **Finish**.

Program Maintenance For Visual Studio .NET

The CaliberRM Install Wizard allows you to perform program maintenance on your CaliberRM/Visual Studio .NET integration.

To perform program maintenance:

1. Complete steps 1-4, starting on page 30. When the CaliberRM/Visual Studio . NET integration is detected, Setup displays the program maintenance **Welcome** screen.
2. Click **Next**. Setup displays the **Program Maintenance** screen.
3. Select the type of program maintenance you want to perform: **Repair** or **Remove**.

See the following sections for each option.

Repairing Your Visual Studio .NET Integration

If you have accidentally deleted or overwritten a file, you can repair your installation.

To repair your CaliberRM/Visual Studio .NET integration:

1. Select the **Repair** option button from the **Program Maintenance** screen and click **Next**. Setup displays the **Ready to Repair the Program** screen.
2. Click **Install** to complete the repair. Setup checks for missing or corrupted files and re-installs them.
3. When installation is complete, Setup displays the **CaliberRM Installation Wizard Completed** screen.
4. Click **Finish** to exit the Install Wizard.

Removing Your Visual Studio .NET Integration

To remove your CaliberRM/Visual Studio .NET integration:

1. Select the **Remove** option button from the **Program Maintenance** screen and click **Next**. Setup displays the **Remove the Program** screen.
2. Click **Remove** and the uninstall procedure completes.

You can also use the standard Windows Add/Remove Programs procedure to remove your CaliberRM/Visual Studio .NET integration. To use this procedure, go to page 29.

Chapter

4

CaliberRM Datamart and BusinessObjects Installation

The CaliberRM Datamart (server) can be installed on the same machine as the CaliberRM server, or on a separate machine.

Note: The user must be a member of the Power User or Administrator's group in order to run Datamart programs.

Note: The BusinessObjects installation is not covered in this section. Please refer to the BusinessObjects User Guide located in **C:\Program Files\Business Objects\ Business Objects Enterprise 6\online guides\en**. Select the PDF file called, "Deployment" for installation information.

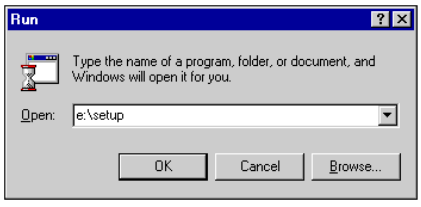
Installing CaliberRM Datamart and BusinessObjects

To install CaliberRM Datamart and BusinessObjects:

1 Close all Windows programs.

2 Insert the CD into the CD-ROM drive.

Note: The CD browser should start automatically if autorun is enabled. If it is not, click **Run** from the Windows **Start** menu. Windows displays the **Run** dialog box.



In the **Open** field, enter **e:\setup**, where **e** is the letter of your CD-ROM drive. Click **OK**.

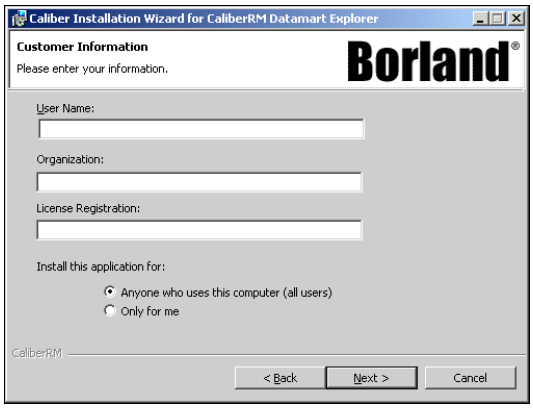
3 Click **Install Admin Components**.

4 Click **Install CaliberRM Datamart and BusinessObjects**. The CaliberRM Install Wizard starts and the **Welcome** screen is displayed.

5 Click **Next**. Setup displays the **License Agreement** screen.

6 Read the license agreement carefully and if you agree to the terms, select the **I accept the terms in the license agreement** option button.

7 Click **Next**. Setup displays the **Customer Information** screen.

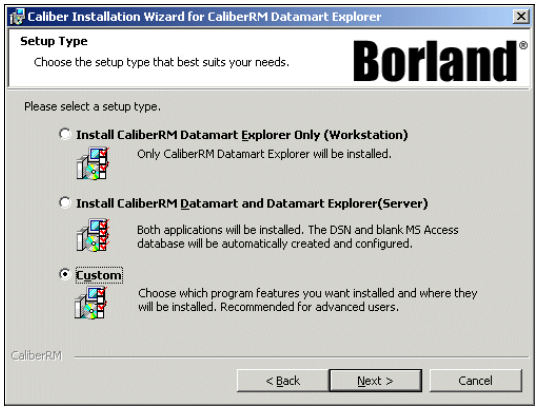


8 Enter your **User Name**, **Organization** and **License Registration** in the appropriate fields, and select an option in the I**nstall this application for** area.

Note: Once a valid CaliberRM Datamart and BusinessObjects license key is entered, any user can run the CaliberRM Datamart programs.

Note: If you add your CaliberRM Datamart license key during the CaliberRM Datamart installation, the key will not appear in the Framework Administrator License Management until you reboot the CaliberRM server.

9 Click **Next**. The **Setup Type** screen is displayed.


Caliber Installation Wizard for CaliberRM Datamart Explorer
Setup Type
Choose the setup type that best suits your needs.
Borland
Please select a setup type.
Install CaliberRM Datamart Explorer Only (Workstation)
Only CaliberRM Datamart Explorer will be installed.
Install CaliberRM Datamart and Datamart Explorer(Server)
Both applications will be installed. The DSN and blank MS Access database will be automatically created and configured.
Custom
Choose which program features you want installed and where they will be installed. Recommended for advanced users.
CaliberRM
< Back
Next >
Cancel

10 Select the type of installation you want to perform:

Note: You must create a system Data Source Name (DSN) manually if you select this option. The DSN is a collection of information used to connect your application to a particular database. Select **Start > Control Panel > OBDC Connections** (or **> Administrative Tools > Data Sources**, depending on your operating system) to create a DSN.

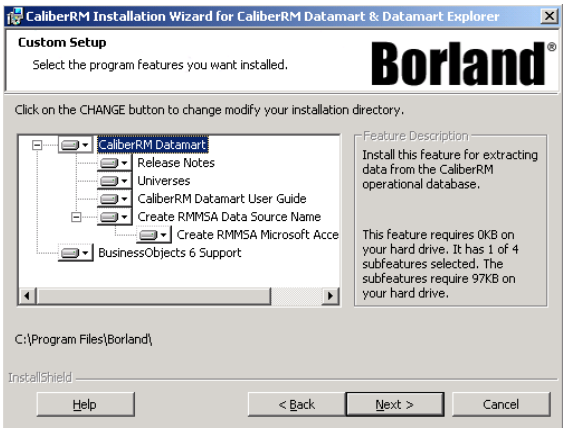
Note: The program also installs Microsoft Data Access Component (MDAC) if the workstation does not have one installed already. Follow the instructions on the MDAC installation screens. You do not have to reboot your machine.

Note: If you install CaliberRM Datamart, then add a license key afterwards, the key will not appear in the Framework Administrator License Management until you reboot the server.

Custom Installation

1 Complete steps 1-11 starting on page 35.

2 Click **Next**. The **Custom Setup** screen is displayed.


CaliberRM Installation Wizard for CaliberRM Datamart & Datamart Explorer
Custom Setup
Select the program features you want installed.
Borland
Click on the CHANGE button to change modify your installation directory.
CaliberRM Datamart
Release Notes
Universes
CaliberRM Datamart User Guide
Create RMMSA Data Source Name
Create RMMSA Microsoft Acce
BusinessObjects 6 Support
Feature Description
Install this feature for extracting data from the CaliberRM operational database.
This feature requires 0KB on your hard drive. It has 1 of 4 subfeatures selected. The subfeatures require 97KB on your hard drive.
C:\Program Files\Borland\
InstallShield
Help
< Back
Next >
Cancel

3 Click on a component's install state icon.

4 Choose the installation option for each component.

Note: If you choose to create an RMMSA DSN, you must click the **Change** button and navigate to the Microsoft .mdb file you want to use.

5 Click the **Help** button for information about each install state.

Click the **Space** button to see a list of the disk space requirements for each component.

Click the **Change** button if you want to change the location where the component is installed. The default install location and database installation path is C:\Program Files\Borland\CaliberRM Datamart for the CaliberRM Datamart (server) and C:\Borland\Business Objects for the CaliberRM BusinessObjects (client).

6 Click **Next**. Setup displays the **Ready to Install the Program** screen.

7 Click **Install** to begin the installation.The **CaliberRM BusinessObjects Read Me** report is displayed.

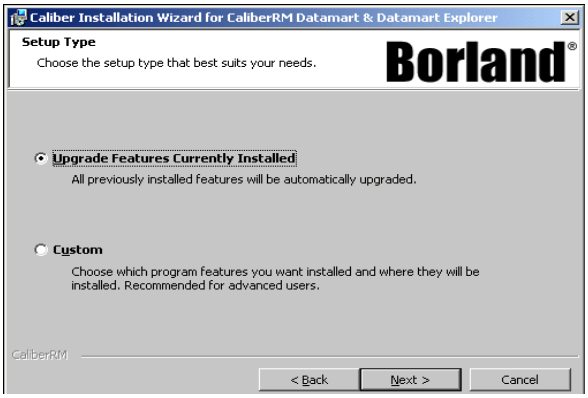
8 Select **File > Exit** to return the CaliberRM Installation Wizard.

9 Click **Finish** to exit the CaliberRM Installation Wizard.

Performing an Upgrade

To upgrade CaliberRM Datamart and BusinessObjects:

1 Complete steps 1- 10 starting on page 35. The **Setup Type** screen is displayed.


Caliber Installation Wizard for CaliberRM Datamart & Datamart Explorer
Setup Type
Choose the setup type that best suits your needs.
Borland
Upgrade Features Currently Installed
All previously installed features will be automatically upgraded.
Custom
Choose which program features you want installed and where they will be installed. Recommended for advanced users.
CaliberRM
< Back
Next >
Cancel

2 Select an option for upgrading:

- **Upgrade Features Currently Installed**: Upgrades your existing installation.
- **Custom**: Allows you to install only the features you want. See page 37 for performing a custom installation.

3 Click **Next**. Setup displays the **Ready to Install the Program** screen.

4 Click **Install** to begin the installation. The **CaliberRM BusinessObjects Read Me** report is displayed.

5 Select **File > Exit** to return the CaliberRM Installation Wizard.

6 Click **Finish** to exit the CaliberRM Installation Wizard.

Program Maintenance

The CaliberRM Installation Wizard allows you to modify, repair or remove your CaliberRM Datamart and BusinessObjects installation.

To perform program maintenance:

1 Complete steps 1-6 starting on page 35. Setup displays the Program Maintenance **Welcome** screen.

2 Click **Next**. Setup displays the **Program Maintenance** screen.

3 Select the type of program maintenance you want to perform: **Modify**, **Repair** or **Remove**.

See the following sections for each option.

Modifying Your Installation

If you want to add or remove a feature from your installation, you can modify your installation.

To modify your installation:

1 Click the **Modify** option from the **Program Maintenance** screen and click **Next**. Setup displays the **Custom Setup** screen.

2 Complete steps 3-9, starting on page 37.

Repairing Your Installation

If you have accidentally deleted or overwritten a file, you can repair your installation.

To repair the installation:

1. Click the **Repair** option from the **Program Maintenance** screen.
2. Click **Next**. Setup displays the **Program Repair** screen.
3. Click **Install** to complete the repair. Setup installs the required files. Click **Cancel** to cancel the installation at any time.
4. Click **Finish** to exit the Install Wizard.

Note: You must restart your machine for the changes to take effect. Logging off and on again is insufficient.

Removing CaliberRM Datamart and BusinessObjects

To remove the CaliberRM Datamart and BusinessObjects from your system:

1. Click **Remove** from the Program Maintenance screen.
2. Click **Next**. Setup displays the **Remove the Program** screen.
3. Click **Remove**.The uninstall procedure completes.

You can also use the standard Windows Add/Remove Programs procedure to remove your CaliberRM Datamart and BusinessObjects. To use this procedure, see page 29.

Index

A

administrative components, installing 5-21

C

CaliberRM
- custom client installation 25
- custom server installation 9
- default install paths 4
- program maintenance 28
- removing 29
- repairing 28

CaliberRM Datamart & BusinessObjects
- installing ??-37
- modifying 36
- program maintenance 36
- removing 37
- repairing 37

CaliberRM SDK, default install paths 4
CaliberRM server, installing 5
CaliberRM Web
- installing 11
- removing 14

custom installation
- CaliberRM client 25
- CaliberRM server only 9

D

default paths
- CaliberRM 4
- CaliberRM SDK 4

E

enabling MPX events 8, 10

I

installation, silent 29
installing
- administrative components 5-21
- CaliberRM client 23
- CaliberRM Datamart & BusinessObjects 33-37
- CaliberRM server 5
- CaliberRM Web 11
- MPX server 20
- Network Install and Upgrade 14
- user components 23, 32
- Visual Studio .NET integration 30

introduction 1-4

M

modifying
- CaliberRM Datamart & BusinessObjects installation 36
- CaliberRM installation 28
- Network Install and Upgrade 19
  - download options 17
  - HTML page 17
  - URL location 18
- Network Install and Upgrade settings 17

MPX
- events, enabling 8, 10
- reconnecting 21
- server, installing 20

N

Network Install and Upgrade
- installation without a web server 18
- installing 14
- modifying 17, 19
  - download options 17
  - HTML page 17
  - URL location 18
- program maintenance 19
- removing 20

P

performing an upgrade
- CaliberRM 27
- CaliberRM Datamart & BusinessObjects 36

product support 1
program maintenance
- CaliberRM 28
- CaliberRM Datamart & BusinessObjects 36
- Network Install and Upgrade 19
- Visual Studio .NET integration 32

R

reconnecting MPX 21
removing
- CaliberRM 29
- CaliberRM Datamart & BusinessObjects 37
- CaliberRM Web 14
- Network Install and Upgrade 20
- Visual Studio .NET integration 32

Removing the CaliberRM Server 37
repairing
- CaliberRM Datamart & BusinessObjects installation 37
- CaliberRM installation 28
- CaliberRM Web 13
- Network Install and Upgrade 19
- Visual Studio .NET integration 32

S

silent installation 29
StarTeam Message Broker 8, 10
support 1
system requirements
- CaliberRM Datamart 2

T

technical support 1

U

uninstall
- CaliberRM 29
- CaliberRM Datamart & BusinessObjects 37

CaliberRM Web 14
Network Install and Upgrade 20
Visual Studio .NET integration 32
upgrade
CaliberRM 27
CaliberRM Datamart & BusinessObjects 36
user components, installing 32
user components,installing 23

V

Visual Studio .NET integration
installing 30
program maintenance 32
removing 32